

Aon Master Trust Frequently Asked Questions

Who are Fisher Funds?

Fisher Funds are a specialist active funds management business. They have been operating since 1998 and have been providing KiwiSaver solutions to New Zealanders since its inception in 2007.

Fisher Funds has 270,000 clients and \$14.5b of client funds that they manage. Importantly, 64% of Fisher Funds ownership is by a New Zealand community foundation, Toi Foundation, who invest profits back into the community. The balance is owned by TA Associates, the same company that is a majority owner of Russell Investments.

Fisher Funds manages a Master Trust which has been operating since 1994. They are the fifth largest Master Trust provider in New Zealand.

Like Aon, Fisher Funds [have been recognised](#) for their award-winning investment performance and client service.

You can find out more about Fisher Funds at fisherfunds.co.nz, or if you'd like to speak with one of the team you can contact us at aon@fisherfunds.co.nz.

Do I need to do anything?

No, you don't. At the moment there is no change to Aon Master Trust.

We will be continuing to provide the same level of service and can answer any questions you have about the Aon Master Trust.

Do I have to talk with different people now?

No, our helpdesk team are still available to help with your queries and can be contacted in the usual way by emailing amt@linkmarketservices.com or calling 0800 266 268.

Can I still log in and view my account online?

Yes, you can still log in to your account in the usual way at aon.co.nz/amt-login. Remember, if you're accessing your account for the first time you'll need to register using your member number. If you're not sure of your member number you can contact our helpdesk at amt@linkmarketservices.com.

Am I still invested in the same fund?

Yes, your investment fund hasn't changed, you are still invested in the same fund or funds you have chosen. We will keep you up to date with any future changes.

Will my fees stay the same?

Currently there is no change to the fees for your employer's plan. [Contact us](#) if you'd like to know the fees currently charged.

Can I still switch to a different Aon Master Trust fund?

Yes, you are still able to choose from of the funds available under your employer's plan in the Aon Master Trust. [Contact us](#) if you'd like to change your fund – we'll provide you with a list of available funds.

Will Fisher Funds assume the investment management of the funds at some stage?

Yes, it is the intention that Fisher Funds will assume the investment management at a future time. There is no date currently planned for this to happen. We will be communicating any changes well in advance.

How does Fisher Funds' investment performance compare to the fund I'm currently invested in?

Operating since 1998, Fisher Funds has an amazing in-house investment team who take an active management approach to your investments and have an impressive history of delivering strong performance for clients.

Fisher Funds rates well against competitors over various timeframes. It's important to remember that performance can vary between any investment manager in the short term. Taking a longer view is important when thinking about your retirement savings.

I have QROPS money invested in the scheme – do I need to do anything?

We are aware of the constraints on our QROPS clients. We will be working with the necessary authorities to understand how the transition will impact our QROPS clients.
